

FY 2005 Missouri Local Records Preservation Grant Program



Guidebook and Application

for the project year July 1, 2004 to June 30, 2005

Matt Blunt
Secretary of State

FY 2005 Application Deadline March 1, 2004

- Applications **MUST** be received or postmarked by the deadline date
- Faxed applications will **not** be accepted
- Submit the signed original application plus five (5) photocopies. **Do not staple, permanently secure or place the original in any type of binding or folder**, secure it with a binder clip or paper clip; the five (5) duplicate copies may be stapled or clipped.

Submit Applications to:

**Local Records Preservation Program
PO Box 1747
600 West Main, Room 107
Jefferson City MO 65102**

ATTN: Grant Administrator

FY 2005 GRANT PROGRAM TIMELINE

Late SEPT/early OCT workshop announcement mailing for FY 2005 grant cycle

Early NOV to early DEC regional grant workshops provided

Mid-NOV to mid-JAN Local Records draft application review available

MARCH 1 (Delivery or Postmark date) application deadline

Early JUNE MHRAB grant review and award session

Mid-JUNE Secretary of State award letters mailed, followed by:

- Grant agreement forms mailed to awardees
- “Regrets” letters from Local Records to un-awarded applicants
- Project implementation packets mailed to project contacts
- 1st grant payment processing generally by Sept

JAN 15 due date for Interim Report

JUNE 1 due date for Final Report

JUNE 30 closing date for the FY05 grant cycle

- Final Reports processed in order received
- Financial adjustments, if necessary, completed
- Final grant payment or returned grant funds processing

Late SEPT/early OCT workshop announcement mailing for FY 2006 grant cycle

Early NOV to early DEC regional grant workshops provided

Mid-NOV to mid-JAN Local Records draft application review available

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Program Description and Guidelines



1. PROGRAM DESCRIPTION AND GUIDELINES

1.1 INTRODUCTION

The Missouri Local Records Grant Program has offered grants each year since the program began in 1991. This financial assistance supports local public records management and preservation efforts. Grants are funded with fees collected by county recorders; between \$250,000 to \$400,000 is distributed per grant cycle. This is a competitive grant program, the number of grant applications submitted and the level of grant funding requested routinely exceeds the total dollars available. The grant program requires all applicants to dedicate local dollars at a prescribed level toward project cost sharing.

The Secretary of State awards grants in consideration of the Missouri Historical Records Advisory Board (MHRAB) application review, advice, and recommendation. The grant program operates within the state fiscal year, July 1 through June 30. Official award status occurs with Secretary of State notification of award and the execution of a grant agreement form. All projects must be closed no later than June 30, which requires not only the submission and approval of a final report, but also repayment of any outstanding monies to the program.

General information about the grant program, a listing of grant workshops, the grant application, and a three-year listing of previously awarded grants is available at the Secretary of State website

www.sos.mo.gov/archives/localrecs/grants/

1.2 ELIGIBLE APPLICANTS AND PROJECTS

Any local government or political subdivision with taxing authority may apply for local records grant funds. Non-profit institutions may benefit from grant funds if they house public records provided the public executive agency from which the records originated is the grant applicant. NOTE: Court records are not eligible for this program, nor are State or Federal agencies eligible applicants.

Examples of the types of records management and/or preservation projects that qualify for consideration include, but are not limited to:

- Planning activities
- Records management
- Preservation microfilming, generally for records older than the current 5 years

- Conservation of unique and/or historically significant original records
- Professional consultant services
- Essential equipment directly related to records management, storage, access, or preservation
- Limited facility renovation for record storage
- Production of reference tools, finding aids, etc.
- Appropriate training or education limited to non-academic offerings
- Production of publications that develop public awareness of, and encourage access to, local records

NOTE: Records that originate with an eligible applicant entity as well as any locally significant materials or other records that have been donated to and owned by an eligible public entity may qualify for project funding.

Ineligible activities include, but are not limited to:

- ◆ Projects completed prior to grant award
- ◆ Expenses incurred prior to the start date of the grant period
- ◆ Existing or permanent staff positions already funded by the agency budget
- ◆ Equipment nonessential to the project
- ◆ Capital improvements to buildings, ex. Construction of building additions, HVAC systems, etc.
- ◆ Payments to lobbyists
- ◆ Hospitality expenses
- ◆ Prizes/awards
- ◆ Benefit activities (social, fundraisers, etc.)
- ◆ Educational outreach not available to the public
- ◆ Tuition reimbursement for academic credit
- ◆ Activities having a religious purpose
- ◆ Inventories, finding aides, or guides not available to the public
- ◆ Purchase of manuscripts or records

1.3 GRANT FUNDING AND LOCAL MATCH

Grant Funding

Planning projects are capped at a \$5,000 maximum award with all other projects capped at \$50,000.

There are two maximum percentage levels of grant funding, which are 70% and 50% of the total project cost. All eligible project components, other than non-standard shelving, equipment, or renovation, can be funded at the 70% level. Non-standard shelving, equipment purchases, as well as renovation services and supplies, are only funded at the 50% level.

Grants funded at the maximum 70% of the total project cost require the remaining 30% of the total project cost to be covered by local match. In certain situations where in-kind contributions are feasible, the local cash match can be as low as 10% of the total project cost. Applicants that have a higher percentage of cash cost-sharing will be given preference when all other things are equal.

Grants requiring a 50% cost share divide the cost of the desired item/s equally between grant funds and local cash. Note, however, that the grant funding level for each of these items generally cannot exceed their award amount unless a *Request to Revise* (form) to modify the budget and amend the grant contract is submitted after award and formally approved by Local Records prior to encumbering funds or purchasing the desired item/s.

Approved project budget categories eligible for grant funding include:

- ✓ Personnel costs as salary only for existing staff working beyond their normal work hours, and/or new hire, part-time or temporary help
- ✓ Supplies, i.e. general office supplies, consumable items
- ✓ Travel that is appropriately and directly related to the project
- ✓ Commercial vendor services, such as microfilming, conservation, etc.
- ✓ Consultant fees for planning or specified project services
- ✓ Shelving at either the 70% or 50% level depending upon the type of shelving
- ✓ Renovation labor, supplies, materials
- ✓ Essential equipment such as storage cabinets, reader/printers or reader/scanners, humidifiers/dehumidifiers, etc.
- ✓ Other services, commodities, etc. that are pertinent and necessary to the project

NOTE: Please see “Application Instructions”, in Section 3, for additional information on eligible project costs.

Local Match

Any funds designated as local match are limited to project-related use and must be spent within the contract period of the grant and prior to submission of the Final Report due June 1. Records must be maintained that show the source, amount of all matching contributions and period in which the match was expended; this is also necessary with any in-kind contribution.

When in-kind contribution is appropriate the minimum 10% of the total non-equipment project cost MUST be cash match. Local match cash, or cash plus in-kind, must meet or exceed the minimum 30% of the total non-equipment project cost.

Proposals showing a higher percentage cash match will be given preference when all other things are equal.

Local cash match consists of new, budgeted funds earmarked for the grant project. This amount must meet the designated 30% percentage level of the total project cost **if no appropriate in-kind contribution can be claimed.**

Local in-kind contributions are non-monetary contributions that allow the value of contributions to be claimed, such as

- donations
- existing services, supplies, and/or commodities
- contributed volunteer time computed at the current Federal minimum wage, etc., or a justified higher salary for more technical or professional level work

1.4 APPLICATION REVIEW AND AWARD PROCESS

The grant review process is competitive with only a set amount of grant monies available for distribution. ***Projects that meet the criteria of the grant program, that are well conceived, fully described, and adequately supported in a correctly completed application form will receive the most favorable review.***

Local Records staff can provide assistance and guidance in completing the application: draft applications can be reviewed mid-November through mid-January with suggestions offered to guide you in developing a proposal that is complete, conforms to application requirements, has a sound budget, and is relevant to the purpose of the program. We encourage you to call the Grant Administrator if you have questions about, or difficulties with, the application form.

Applications for the FY 2005 grant program are due March 1, 2004. The Missouri Historical Records Advisory Board (MHRAB) reviews applications in late spring/early summer and makes their award recommendations. If an applicant proposal is outside the sphere of expertise of the Local Records staff or the MHRAB, advisors or consultants may be employed to review the application with Local Records covering any consultation fee.

To avoid any potential conflict of interest in reviewing applications and recommending awards, Board members will:

1. Not consider a proposal where a board member or a member of the Secretary of State's staff will derive compensation

2. Abstain from reviewing or voting on proposals if s/he is
 - Indirectly connected with a proposed project through employment at the same local government agency
 - Indirectly supervises the project
 - Serves as an unpaid consultant to the project
 - Is an officer of an institution, organization or association allied with the proposal
3. Participate in discussion of, but not vote on, a grant proposal if s/he merely subscribes to membership in a private organization or association allied with the proposal.

Projects may be awarded in full, partially funded, or denied funding. The Board recommended award list is forwarded to the Secretary of State for approval. Award letters and agreement forms are mailed to the awarded applicants.

When scheduling and funding permits, the Secretary of State presents facsimile checks to awarded grantees at an Award Ceremony held during the summer. Grantees can meet informally with the Secretary, Local Records administration and staff, as well as their assigned regional Field Archivist. Legislators are notified of awards within their jurisdictions.

The Secretary of State Communication Director prepares a media release for each awarded agency, which is forwarded to the grantee's area newspaper.

1.5 GRANT ADMINISTRATION

1.5.1 General Information

The Grant Program's *Administrative Rules* (Title 15, Division 30, Chapter 45, Section 030 et seq) provides the operational basis for the Local Records Preservation Grant Program. Text is provided in this application packet in Section 5 and is also available online at:

www.sos.mo.gov/adrules/csr/current/15csr/15c30-45.pdf

1.5.2 Statutory Obligations

Application for and acceptance of grant project funds administered by the Office of Secretary of State, Local Records Preservation Program, obligates the grant recipient to comply with:

- ◆ RSMo 610 (Open Meeting and Records)
- ◆ RSMo 109 (Public and Business Records)
- ◆ RSMo 50 and 34 (as applicable for purchasing procedures)

- ◆ Title VI of the Civil Rights Act, the Rehabilitation Act of 1973, the Age Discrimination Act of 1975, and the Americans with Disabilities Act of 1990

1.5.3 Staff Assistance

Retain this *Application and Guidebook* for your reference and use after grant award. The answers to many questions that will arise as you implement your project are provided in this publication. A packet of additional pertinent information, materials, forms, instructions and completed sample forms will be forwarded to the designated project contact after official notification of award.

A regional Field Archivist is assigned to each grant project. This individual is available to guide and assist you in successfully completing selected project activities. Questions or assistance requests may be directed to your Field Archivist, or to the Grant Administrator.

Grant Administrator contact information follows:

Phone	573-751-2798
Fax	573-526-3867
Mail	Local Records Preservation Program PO Box 1747 Jefferson City MO 65102
E-mail	maria.hines@sos.mo.gov

1.5.4 Project Changes

The Grant Administrator MUST receive written notification and approve of any change to the project prior to implementation of the desired change. Changes to the grant, submitted on a *Request to Revise* form may include, but are not limited to:

- Any pertinent Personnel changes such as authorized official, project contact person or other project staff carrying out specific project assignments; change of address, telephone or fax numbers
- Programmatic changes such as altered dates, added or deleted record series from microfilming projects; modification of the awarded project's scope; added/deleted project components or activities
- Budget revisions, which are permitted only with official approval from Local Records under the following conditions:
 - the original total award amount is not exceeded
 - all applicable match requirements are met

- ❑ a written request is submitted on a *Request to Revise* form, and includes
 - ✓ identification of which budget categories and/or budget line items are to be reduced/increased and by what amount
 - ✓ the reason/need for the revision
 - ✓ the total dollar amount of funds to be reallocated

NOTE: Local Records must approve a budget revision prior to the expenditure of the desired fund reallocation

- Projects are considered for extension when extenuating circumstances, i.e. significant and unavoidable project implementation difficulties, delay completion of the project well before the June 30 closing date of the grant cycle. Extension requests are considered for review under the following conditions:
 - ❑ This office received timely first notice and continuing communication regarding said difficulties prior to an extension request
 - ❑ A written extension request submitted on a *Request to Revise* form clearly details
 - ✓ the problem
 - ✓ significant contributing factor/s
 - ✓ a timeline of preferably 30 to 90 days to complete a scaled-back, manageable portion, if not the complete project

NOTE:

- Extension Requests are not automatically approved: Local Records may disallow, approve as requested, or reduce the extension time period
- Grant projects in Extension Status render their jurisdiction ineligible for future grant award until satisfactory completion of the current project

1.5.5 Grant Payments

Recipients of grant awards less than \$10,000 (\$9,999 and under) will receive 70% of the award amount as a first grant payment generally by early fall. Any remaining funds due, up to the final 30% of the grant award, will be paid upon submission and approval of the *Final Report*. The total award amount is paid out only when full expenditure of grant funds is documented.

For grant awards of \$10,000 or more the initial grant payment will be 35% of the award amount with a second 35% payment made upon grantee request and Local Records

receipt and approval of an *Interim Report* that illustrates an appropriate level of project implementation has occurred. Any remaining funds due, up to the final 30% of the grant award, will be paid upon submission and approval of the *Final Report*. The total award amount is paid out only when full expenditure of grant funds is documented.

1.5.6 Project Bids and Expenditures

Note the following regarding bids and purchasing:

- Commodities or services purchased off state contract under the Cooperative Procurement Program will not require bids
- Items/services costing \$3,000 or less may be purchased with prudence on the open market
- Items/services cost more than \$3,000 but less than \$24,999 must be competitively bid but do not require a formal mail or advertisement solicitation. **Any item or service costing more than \$3,000 will require the solicitation of at least three bids.** If you do not receive three bids, proof that bid was requested will be sufficient. If a vendor does not respond to a bid request, a “no bid” response by a vendor may be counted towards the requirement for three (3) competitive bids provided that the “no bid” vendor/s could have reasonably been expected to submit a bid. Certification or proof of bid, as well as state contract purchases must be provided as documentation as appropriate when the program reports are submitted.
- Purchases of \$25,000 and more shall be advertised for bids in at least two daily newspapers of general circulation in such places as are most like to reach prospective bidders; such advertisement shall appear at a minimum one time at least five days before bids for such purchases are to be opened
- **IF the grantee’s agency purchasing requirements are more stringent than those stated above, local requirements must be followed**
- Documentation of bid solicitation, or purchase off the state contract, is required by Local Records

Information regarding the Cooperative Procurement Program, which allows a local government to purchase supplies, commodities, services, etc. off state contract, is available online at

www.oa.mo.gov/purch/coop.html

or by contacting Karen Herman, Cooperative Procurement Officer

Phone: 573-751-4169
Fax: 573-526-3576
Mail: PO Box 809
301 West High St.
Jefferson City MO 65102
E-mail: hermak@mail.oa.state.mo.us

Project implementation and expenditure documentation is required to support all grant fund payments made by Local Records.

- Report forms, instruction sheets, and sample completed forms are included in the project contact's packet that is mailed after grant award is made.
- The instruction sheet provided with the *Report* forms has examples of approved documentation for commodities and services as well as in-kind contributions.
- It may be necessary to submit other documentation, such as consultant contracts, copies of finding aids, manual, etc. produced as a result of grant funding depending your particular project: documentation of the bid process is also required.

1.5.7 Microfilming Project Requirements

- Microfilm produced with grant funding must meet Local Records' technical specifications: the selected vendor must comply with our production and quality control standards for a microfilming project to be to successfully completed. Our archival microfilming requirements and standards are included in the publication, *Guidelines for Local Records Microfilming*, **request a copy from this office if you do not have one.**
- Local Records must have on file a completed *Microfilm Information Sheet* identifying the selected vendor. Please forward the information sheet to the Grant Administrator as soon as you have contracted with the selected vendor after grant award.

- Records submitted to a vendor for microfilming must include appropriate targets. Targets are “information” sheets that identify the specific records on the microfilm reels as well as provide handling or processing directions to the vendor regarding your original materials. A sample *Title Target* sheet, a clean working copy, and samples of other types of targets is provided in the project contact’s packet. The sample series title target will assist you in describing the arrangement and description of the records to be filmed.

NOTE: A Field Archivist or other Local Records staff must personally approve records preparation and targets before materials are sent to the vendor. A *Checklist for Grant Funded Microfilm Projects* form is completed by the Field Archivist and then forwarded to the Grant Administrator. Consider retaining copy in your grant file and forwarding a copy to vendor with the targets and original records.

1.5.8 Accounting and Auditing Requirements

Financial records must be kept in accordance with agreed upon accounting practices. Grantees must comply with the audit requirements set forth in Missouri statutes for local government units. These records shall be subject to inspection by Secretary of State staff during regular business hours throughout the grant period and for the following three years after the project is closed.

If any litigation, claim, or audit is begun before the end of three (3) years, the records must be retained until such proceeding is resolved. Should any adverse finding occur, a copy of the audit, finding, and a report on final resolution must be forwarded to Local Records.

1.5.9 Reports

The Local Records Grant Program requires both the narrative and financial components of the Interim and/or Final completed during the project period; each of these report components provides an outline of project progress:

- Only expenditures incurred during the inclusive dates of the awarded grant cycle and in the approved budget categories can be claimed
- Though the application budget summary is based on rounded-off figures for audit purposes the actual expenditure amounts must be used to complete the financial status report
- Documentation of expenditures and bids is required.

The ***Interim Report*** is due on or before **January 15**. If the award amount is over \$10,000, the Interim Report must be submitted and approved before a requested second 35% grant payment can be made. A ***Final Report*** may be submitted in lieu of the ***Interim Report*** if the project is completed by the Interim Report date.

The ***Final Report*** is due on or before **June 1**. A check for unexpended, previously paid grant monies, and/or unexpended interest earned on those monies, must be included with the ***Final Report*** or as soon as possible thereafter. Early submission of the ***Final Report*** is highly encouraged to avoid significant payment delay of any remaining grant monies due the grantee. The state computerized financial system's data migrates to the next fiscal year program during June and the program is not accessible until July: no grant payments can be processed until data migration is completed.

1.5.10 Withdrawal of Awarded Grant Funds

Failure to conform to the:

- project parameters as awarded
- programmatic, fiscal or reporting requirements of the grant program as described in this *Guidebook and Application*
- or the technical specifications in *Guidelines to Local Records Microfilming*

can put a grantee in default status.

In the event Local Records deems a grantee to be in default, the grant will be revoked, funds are forfeited and must be returned to Secretary of State – Local Records. Any grantee in default status that has not returned funds due the Local Records grant program, renders their jurisdiction ineligible for future grant award until satisfactory resolution of the out-of-compliance project.

1.6 MICROFILMING PROJECTS

1.6.1 Introduction

Microfilm is the miniaturized images of paper records photographically reproduced on roll film. It is the same basic process of conventional black and white photography; silver compounds in a gelatin emulsion on a film base are exposed to visible light. Microfilm processed according to accepted standards, which produces a clear, accurate and permanent reproduction of the original, can be deemed an original record and admissible evidence in courts and administrative agencies.

1.6.2 Reasons to Microfilm

- **PRESERVATION** – the microfilm silver master stored under environmentally controlled conditions can retain uncorrupted information for an optimum life expectancy of 500 years for the protection of original document information
- **IMPROVED ACCESS** – information can be easily stored in a single location; immediate copies are readily available with a reader/printer or other appropriate printing or duplicating device. Duplicate film copies can be placed in several locations to improve public access and customer service
- **FILE CONTINUITY** – information cannot be disorganized or lost
- **SECURITY** – remote storage of silver masters provide protection against fire, water, other disasters; replacement microfilm rolls are available
- **ECONOMIES OF SPACE AND MONEY** – microfilmed records require approximately 2% of the space occupied by paper documents

1.6.3 Eligible Records

Not all records are eligible for grant-funded microfilming; only records that meet certain criteria qualify for consideration as a microfilm project. Permanent, long-term, or historically significant records are generally eligible for microfilm project funding. The Missouri Secretary of State's office produces and provides retention schedule record manuals for most local government entities. These manuals include basic information on records management, a glossary of terms, and a schedule of retention periods for the standard records of specific offices. Review the appropriate retention manual for your agency to identify records eligible for microfilming. Retention Manuals are available electronically at Secretary of State web site:

www.sos.mo.gov/archives/localrec/schedules/

Records must be older than the current 5 years for filming, unless they are included as part of a longer time frame, or extenuating circumstances, such as a mold problem, are adversely affecting the current records. Be sure to include this information in the project narrative.

Microfilm projects are awarded for specified, eligible record series, ***any changes, additions or deletions, in the record series must be requested in writing and approved by the Local Records Grant Administrator prior to filming.*** A Request to Revise form must be submitted with an updated *Records to be Microfilmed* form for each added or changed series.

1.6.4 Special Notes

- ❑ A microfilming grant will cover production of a silver master and one diazo copy on 35mm roll film for standard filming
- ❑ For aperture conversion projects, the grant will cover production of a silver master and one silver duplicate on 35mm roll film
- ❑ Only in special instances and with acceptable justification will Local Records approve 16mm film
- ❑ One image per microfilm frame is preferred; justification for other formats is required, for example, bound volumes that will produce fully legible images may be filmed two images per frame, or aperture cards that include more than one embedded image per card
- ❑ Grant-funded microfilm must meet Local Records technical specifications
- ❑ Open reel film is required and:
 - must include appropriate labeling and targets
 - be at least $\frac{3}{4}$ full
 - not contain any plugs or fasteners
 - be sequentially numbered
 - have the records arranged according to accepted records management practice or standard filing procedures, for example, chronological order, i.e. beginning with the oldest and continuing to the most current records

1.6.5 Project Outline

NOTE: Some steps may be completed concurrently rather than in strictly sequential order

- Secretary of State award letter states award amount
- Agreement forms are signed and returned
- Grantee evaluates microfilming bids and awards a vendor contract
- *Microfilm Information Sheet* is sent to Local Records
- Grantee prepares the records for microfilming
- Grantee prepares various identification and informational targets for the records and contacts the Field Archivist for review of the targets
- Targets are revised as necessary and approved
- Field Archivist inspects the records and submits *Microfilm Checklist* form to Local Records prior to releasing the records to the vendor for filming
- Vendor films, develops, inspects, and produces duplicate film copies; silver masters are sent to Local Records for quality control review

- **Local Records completes technical inspection of the microfilm for density and resolution**
- Grantee receives the approved microfilm diazo or silver duplicate rolls after the silver master passes Local Records inspection
- Grantee inspects their film copy for appropriate targets, text legibility, and content completeness
- **IF** Grantee and vendor follow up is necessary to re-film unacceptable products due to illegible text and/or incomplete content; repeat this process beginning at “*Vendor films, develops, inspects, and produces ...*”
- Grantee notifies Local Records of film acceptance
- **All film must pass Local Records quality control inspection well before the end of the grant cycle in order for the *Final Report* to be completed and submitted on or before the June 1 deadline**
- Local government official authorizes original record destruction only after all microfilm is confirmed as complete and acceptable. The local government is responsible for ensuring all the information is captured.

1.6.6 Preparatory Activities

The final microfilm product will only be as good as your prepared records. Future success in locating specific information is directly related to the time and effort spent preparing the records. Twenty-five percent or more of the project time frame may be needed to prepare the records for microfilming with up to another 15 % needed after microfilming to check the film for record legibility and completeness.

When selecting the quantity of records to be filmed in a single grant cycle consider the time, staff, supplies, materials and equipment necessary. Personnel, supplies, etc. are eligible project components qualifying for grant funding when preparatory activities are begun after a grant has been awarded.

1.6.7 Record Preparation Sequence

- Check all record storage locations to make sure the range of years is complete for the records you wish to film
- Use the appropriate record retention manual to identify and separate record series eligible for filming. (NOTE: You must complete this step to correctly complete the *Records to be Microfilmed* form/s in a grant application.)
- Identify and organize the selected records by office of origin and record series

- Prepare records for filming by
 - Un-folding
 - cleaning
 - removing paperclips, staples and other extraneous matter
 - maintaining, or establishing, logical order, ex. chronological, numerical
 - re-folding, labeling and properly storing
- Produce identification and informational targets
 - ◆ Series Title Targets identify each record series by:
 - location: county and/or city as appropriate
 - office of origin
 - record series
 - time frame covered (inclusive dates with any breaks in the run indicated, for ex. 1930-1950, 1953, 1957-2000)
 - general information content
 - arrangement information, i.e. chronologically, alphabetically, etc.
 - if the information is confidential or closed
 - ◆ Each book/volume or box of foldered loose-leaf records will have an abbreviated identification target; volumes will be arranged in order; boxes must be labeled as to the range of materials enclosed and numbered in the order they are to be filmed.
 - ◆ Additional information targets direct
 - attention to the correct sequencing of volumes or boxes
 - specific instruction to the vendor to handle selected pages or items in a particular way
 - ◆ **Produce an inventory list of the series with individual volumes or boxes to be filmed for yourself and the vendor.** This will assist in developing an index to the microfilm reels and document materials received and returned by the vendor. Your vendor may also find copies of the *Checklists* helpful.

1.6.8 Working with Vendors

Microfilming cost estimate/s is necessary to complete the grant application. The volume of materials to be microfilmed must be determined and a cost basis established for filming on 35mm roll film that produces one silver master and one copy on open reels. A standard cost basis for microfilming can be per image cost, the cost per 1,000 images, or cost per bound volume. It is important to have reasonable and accurate estimate/s for your proposed budget.

Vendors can provide an approximate cost based on the estimated number of pages and/or images, however, do not expect them to spend extensive time locating and surveying the range and condition of the materials without commensurate compensation

for the time and effort involved. If the vendor charges for this level of service it is considered a pre-grant expenditure that is not eligible for reimbursement with grant funds.

After a grant is awarded the grantee evaluates vendor bids and awards a contract for services. The bid and contract processes will establish the performance expectations and responsibilities of both parties for specified services with set parameters within a mutually acceptable time frame and payment schedule.

1.6.9 Local Records Support

Additional information, directions, and sample forms will be provided to the designated project contact after official award. These materials, plus *Guidelines for Local Records Microfilming* can guide you through the records preparation and bid process. Assistance is available from your assigned regional Field Archivist as well as the Grant Administrator.

Grant Administrator contact information is

Phone	573-751-2798
Fax	573-526-3867
Mail	Local Records Preservation Program PO Box 1747 Jefferson City MO 65102
E-mail	maria.hines@sos.mo.gov

Application Preparation Tips



2. APPLICATION PREPARATION TIPS

Step One – Getting Oriented

READ this *Guidebook and Application* to become familiar with the program

- ◆ Determine if your agency, institution or organization is eligible for this grant program and if your proposed project is eligible
- ◆ Understand what your responsibilities will be if you are awarded a grant
- ◆ Know what information must be included in your application: refer to the application instructions in Section 3 to complete the application forms
- ◆ Objectively evaluate your available resources, develop a realistic estimate of the funds, staffing and time needed to undertake and complete the project within the grant cycle time frame

NOTE: The best project proposals are focused, achievable and part of a long-term records management plan

Step Two – Getting Started

- ◆ Use the application pages in this packet as MASTERS, save them to make working copies for use during your planning process
- ◆ We recommend you separate the individual tabbed sections of this *Guidebook* and save them in a folder or binder.
 - You will want to refer to specific sections as you develop your proposal
 - The *Guidebook* will be a ready reference source of information to effectively administer an awarded grant.
- ◆ Allow sufficient time to develop a successful proposal
 - Do not procrastinate
 - Guarantee your local funding as soon as possible
 - Prepare a draft, edit and revise to achieve the best proposal possible
- ◆ **Research** to determine realistic costs and don't underestimate the level of staffing and time commitment required. Costs can change; everything will take longer than you anticipated; expect delay and problems. One of the most frequently made comments in final reports was how much time the project required in excess of what was originally estimated.
- ◆ Contact the Grant Administrator or your regional Field Archivist for assistance if you have questions, need more information about the program in general, need more specific detail about your type of project, or the application form in particular

Step Three – Putting It All Together

- ◆ FOLLOW the application guidelines, instructions and format. A submitted application must be complete
 - Use the current Application form
 - **Refer to the Instructions in Section 3 as you complete each entry**
 - Respond to all the sections
 - Arrange the pages in the correct order
 - Attach all appropriate support materials.
- ◆ Make your responses clear and to the point; your proposal will be judged on content, not weight
- ◆ Check and recheck the budget figures and computations; make sure the numbers on the budget summary sheet reasonably correspond with the narrative budget detail totals and the submitted vendor cost estimates
- ◆ **Have someone in another agency/office review your draft** for clarity, typos, spelling errors, etc: if they can't understand the proposal, there's a good chance some of the review board members won't either.
NOTE: The Grant Administrator can review your draft application mid-November through mid-January to identify inconsistencies or provide suggestions to strengthen the proposal. Applications submitted through February until the first of March will be forwarded for Board review as is.
- ◆ All signatures should be in blue ink
- ◆ **PROOFREAD THE FINAL DRAFT BEFORE SUBMITTING IT**
- ◆ Use the *Application Checklist* to assure the application is complete and the pages are in the proper order
- ◆ Submit the required six (6) copies: your original application plus five (5) photocopies. **Do not staple, permanently secure or place the original in any type of binding or folder**, secure it with a binder clip or paper clip. The duplicate copies may be stapled or clipped.
- ◆ **Applications MUST be received or postmarked by the March 1, 2004 deadline date to advance in the review process**

Application Instructions



3. APPLICATION INSTRUCTIONS

3.1 Outline of Application Component Parts

- Applicant Identification
- Budget Summary
- Project Proposal Narrative
- Budget and Financial Considerations
- Related Evaluation Factors
- Support Materials

3.2 General Instructions

- Use the provided application pages and forms as a photocopy master to produce working copies in developing your project proposal
- If you chose to produce and submit a word-processed application text, rather than the provided pages for the application narrative, you **MUST** use the same headings and sequence as the application form
- **All pages and sections of the application must be completed and arranged in the correct order.** Refer to the Application Checklist at the end of this chapter. Do not include forms that are not appropriate or applicable to the project.
- All appropriate support materials **MUST** be attached to the application
- The original application must be hand-signed by the appropriate authorized official **in blue ink**
- Retain a photocopy of the completed application for your files
- Submit six (6) copies: your original application plus five (5) photocopies. **Do not staple, permanently secure or place the original in any type of binding or folder**, secure it with a binder clip or paper clip. The duplicate photocopies may be stapled or clipped
- **Local Records must receive applications delivered or postmarked no later than March 1, 2004**

3.3 SPECIFIC INSTRUCTIONS

3.3.1 Applicant Identification

For all agency or personnel entries, please provide

- *Full name and title*
- *Complete address including both street and post office box when appropriate, plus zip code*
- *Indicate if the phone and fax listing are the same number*
- *Provide your e-mail address if you wish to correspond by e-mail*

Senate/House Districts – This information is only used for statistical purposes. If you are unsure of the district, please call your local election authority and enter the correct number is the appropriate designated legislative category.

Applicant Agency – This is the local government entity/political subdivision with taxing authority as defined by Missouri Revised Statutes, or a sub-unit thereof. This agency is generally the direct beneficiary of the applied grant funds, for example, the city clerk or county collector.

Authorizing Agency – If the applicant agency does not have the independent authority to encumber funds or enter into binding contracts, the agency possessing that authority should be identified here, for example, City of X, County of Y. The designated Authorizing Official, or other specifically identified individual with the authority to encumber funds or enter into binding contracts, must sign the budget summary page.

Federal Employer Identification Number (FEIN) - The FEIN number is necessary to set up your grant payment account. This is a nine-digit number that usually begins 43 or 44.

Electronic Deposit of Grant Funds - If you want to receive payments by direct deposit, mark “YES.” **If you do not have a previously established and active electronic deposit account, complete the ACH/EFT form in this application.** Electronic Fund Transfer will remain in effect for the agency specified on the Check Payee form; if “NO” is marked for electronic fund transfer a paper check payment is processed.

Primary Project Contact – This is the person who:

- Actively manages the project on a day-by-day basis
- Has daily and hands-on assignments for implementing project activities
- Is personally knowledgeable of current project status

Local Records staff will contact and consult with this designated individual on implementation activities, forms, and reports for the project. Note: Formal project reports may or may not be completed by this person.

Application Preparer – This entry identifies the individual responsible for gathering the application information and completing the forms. Local Records will contact this person should more specific information pertaining to the submitted application be required.

SAMPLE 3.3.1

Missouri Secretary of State
Local Records Preservation Program
FY 2005 Grant Application

James C. Kirkpatrick State Information Center
PO Box 1747, Jefferson City, MO 65102-1747

State Senate District: 10

State House District: 164

Applicant Agency: Pitt County Clerk

County: Pitt

Agency Head Name/Title: Ira Burford Gooden, County Clerk

Address: Pitt County Courthouse, Room 111
37 Courthouse Square
Whiteacres MO 65655

Telephone: 213-546-8790

Fax: 213-546-8794

E-mail: goodib@pittco.net

Federal Employer Identification Number (FEIN): 44-44030020

Would you like your funds electronically deposited? ☐ YES ☒ NO

Authorizing Agency (if different from above): Pitt County Commission

Authorizing Official Name/Title: Isaac Neville Charge, Presiding Commissioner

Address: Pitt County Courthouse, Room 112
37 Courthouse Square
Whiteacres MO 65655

Telephone: 213-546-8791

Fax: 213-546-8794

E-mail: chargin@pittco.net

Primary Project Contact Name/Title: Wright Handy, Deputy Clerk

Address: Pitt County Courthouse, Room 111
37 Courthouse Square
Whiteacres MO 65655

Telephone: 213-546-8790

Fax: 213-546-8794

E-mail: handyw@pittco.net

Application Prepared by (Name/Title): Wright Handy, Pitt County Deputy Clerk

Address:

Pitt County Courthouse, Room 111
37 Courthouse Square
Whiteacres MO 65655

Telephone: 213-546-8790

Fax: 213-546-8794

E-mail: handyw@pittco.net

Date: 2/02/04

3.3.2 Budget Summary

- This section will be completed after you have determined the individual component costs of your project
 - Round off all figures on this form to the nearest dollar: this figure must reasonably correspond the totals provided in the budget detail section of the narrative and vendor estimates
 - Totals for lines down and across the page must equal the total project cost for the non-equipment portion of the project with the minimum 30% match level, and/or the equipment portion that has a 50% match level
 - Check your figures and computations to verify the costs were correctly entered and the local match percentages meet grant requirements. For example, projects allocating grants funds at the maximum 70% of the total project cost require a 30% local match. In situations where in-kind contributions are appropriate the local cash match can be as low as 10% of the total project cost with the remaining local match covered as in-kind. All items included in the equipment portion are matched at the 50% level.
-
- Identify and provide budget category costs and totals
 - These figures must accurately summarize the budget detail totals provided in the application narrative and be based on submitted vendor estimate/s
 - The total cost of new personnel, vendor, consultant services, or purchased commodities, products, equipment each MUST be equal to **grant funds plus local cash match for the item's total cost**

Signature of the Authorizing Official (in blue ink) establishes official approval of the submitted project proposal and budget.

The signatory individual must be the authorized local governmental or political subdivision official with the statutory authority, or another duly designated individual in the agency with the authority to enter into binding contracts and encumber funds for the applicant agency.

This authorized official will also be the signatory agent for the Grant Agreement, which establishes a contractual relationship between Secretary of State, Local Records, and the awarded grantee.

SAMPLE 3.3.2-A BUDGET SUMMARY

Budget Category	Grant Funds (70% maximum)	Cash Match (10% minimum)	In-Kind	TOTAL (100%)
<i>Personnel</i>	<u>400</u>	<u>102</u>	<u>1598</u>	<u>2100</u>
<i>Supplies</i>	<u></u>	<u>90</u>	<u></u>	<u>90</u>
<i>Travel</i>	<u>4500</u>	<u>100</u>	<u></u>	<u>4600</u>
<i>Vendor</i>	<u></u>	<u></u>	<u></u>	<u></u>
<i>Consultant</i>	<u></u>	<u></u>	<u></u>	<u></u>
<i>Other: Specify</i>	<u></u>	<u></u>	<u></u>	<u></u>
<u></u>	<u></u>	<u></u>	<u></u>	<u></u>
<u></u>	<u></u>	<u></u>	<u></u>	<u></u>
<i>Shelving</i> <i>(Standard Metal)</i>	<u>693</u>	<u>507</u>	<u></u>	<u>1200</u>
Subtotals	<u>5593</u> (70% maximum)	<u>799</u> (10% minimum) [Note: Local Match = 30% of this portion of the project cost]	<u>1598</u>	<u>7990</u> (100%)
<hr/>				
<i>Equipment: Specify</i>	<i>50% GRANT funds</i>	<i>50% CASH match</i>		
Microfilm				
Cabinet	<u>175</u>	<u>175</u>		<u>350</u>
<u></u>	<u></u>	<u></u>		<u></u>
<u></u>	<u></u>	<u></u>		<u></u>
Subtotals	<u>175</u>	<u>175</u>		<u>350</u>

Grant Funds Requested:5768**Total Project Cost:**8340

Certification of Authority to Secure and Encumber Project Funds

Isaac Neville Charge, Presiding Commissioner
Printed Name/Title of Authorizing Official

Isaac Neville Charge
Signature of Authorizing Official

Date February 02, 2004

Non-equipment project components are funded up to 70% of the total project cost; the remaining 30% of the total project cost must be provided as local match. A minimum 10% can be provided as cash match **IF** appropriate in-kind costs can be claimed.

70% maximum LRP grant funds	
30% minimum local match (when appropriate, as a minimum 10% as cash	
	with the remainder as in-kind)
<u> </u>	
100% total project cost	

EXAMPLE: A microfilming and shelving project is estimated to cost a total of \$8,340

Microfilming component at 70% grant funded level

Personnel estimate =	\$2,100 (140 hours x \$15.00/hr)
Estimated Supply costs =	\$ 90 (for folder, boxes etc.)
Vendor estimate =	\$4,600
Shelving quote =	<u>\$1,200</u>
<i>Microfilming subtotal</i> =	<i>\$7,990</i>
70% grant funds =	\$5,593 (\$7,990 x .7)
10% local cash match =	\$ 799 (\$7,990 x .1) for new hire salary
20% local in-kind =	<u>\$1,598</u> (\$7,990 x .2) for existing staff salary
Microfilming subtotal =	<i>\$7,990</i>

Reader/printers, non-standard metal shelving, and other equipment items are funded at the 50% level.

Equipment component

Microfilm Cabinet estimate =	\$350
50% grant funds =	\$175 (\$350 x .5)
50% local match =	<u>\$175</u>
<i>Equipment subtotal</i> =	<i>\$350</i>

Total Cost breakdown and total project cost:

Grant Funds =	\$5,768	(\$5,593 + \$175)
Cash Match =	\$ 974	(\$ 799 + \$175)
In-Kind Match	<u>\$1,598</u>	
	\$8,340	

NOTE:

- Grant funds plus local cash match **MUST** equal the cost of new personnel salary, vendor services, consultant services, or purchased commodities/products/equipment
- Round your figures off to the nearest dollar to show whole dollar amounts for the Budget Summary
- When all other things are equal applicants with a higher percentage of cash match will be given preference
- Please call the Grant Administrator if you need assistance with your budget

3.3.3 Project Proposal Narrative

Statement of Purpose - This is a brief statement that clearly identifies your problem and goal.

Project Summary - Provides more detail than the statement of purpose.

- It is a brief and general description of how the project will be developed and implemented.
- It describes
 - the current situation
 - provides a brief and general overview of how the problem will be addressed
 - states the anticipated outcome of a successfully completed project

Detailed Timeline and Work Plan –

- Lists by specific months, or weeks of the month, the progressive activities of the project that will be accomplished within each time period. Be sure to allow sufficient preparation time at the beginning of your project and sufficient reporting time at the conclusion your project
- **Your project must be completed**, i.e. all activities finished, equipment purchased and in place, all silver master microfilm received for approval by Local Records, **well in advance of submission and approval of your *Final Report* on or before June 1, 2005**. Keep the project manageable knowing that inevitable delays will occur; do not underestimate the time and staffing commitment levels.

Project Objective/s - Identify the expected result you hope to achieve. These are specific, understandable, and when possible, measurable results, for example:

- 50% of student cumulative records from 1920-1960 will be prepared for future microfilming
- Shelving units and filing cabinets will be installed and in use by March 2005
- Reader/printer will be installed, operational, and appropriate staff trained in its use by January 2005
- 30% of the Recorder of Deeds original records will be microfilmed by February 2005

Evaluation of Project Results – HOW will you identify and/or measure the anticipated result/s of your project?

- Will there be an improvement in: space allocation, job efficiency, job functions?
- Are cost savings expected?
- Are you able to serve the public or perform your duties more effectively?

SAMPLE 3.3.3 Project Proposal Narrative

1. Statement of Purpose

Pitt County will organize and consolidate all its commission records in a designated record storage area.

2. Project Summary

The county clerk will gather and organize current paper and microfilm materials, plus microfilm Commission Minutes, Resolutions, Ordinances and Indexes from 1890 to 2000, to improve management of and access to commission records.

3. Detailed Timeline and Work Plan

July – Sept.	Purchase supplies; locate, gather and organize records
Sept. – Oct.	Initiate bidding, contracting and purchasing of shelving, microfilming service, and microfilming storage cabinet Submit <i>Microfilm Information sheet</i> to Local Records
Oct. – Dec.	Complete records and target preparation and get check-off approval for filming Install shelving; transfer paper files Install cabinet and store existing microfilm
Dec. – Jan.	Submit Interim Report Begin checking returned microfilm for legibility and completeness
March	Anticipate project completion: all film inspection completed and their corresponding paper records transferred to the Pitt County Historical Society
May – June	Submit Final Report

4. Project Objectives

By May 1, 2005

- Record storage area completed and in use
- All Commission paper records arranged and stored on shelves with retention periods noted
- All Commission Minutes, Resolutions, Ordinances and Indexes from 1890 to 2000 microfilmed and checked to verify completeness of records and their legibility

5. Evaluation of Project Results

We will determinate the average time needed to locate records at the beginning this project and after project completion confirm an anticipated reduction in staff time and labor to manage our records and provide constituent services.

3.3.4 Budget and Financial Considerations

Budget Detail, Explanation and Justification –

- Provide a detailed breakdown and cost basis for each component part included in the budget category totals that will be entered on the *Budget Summary* sheet
- In some cases a brief statement is necessary to explain or justify why these particular expenditures are appropriate; for example, the reason for selecting a reader/printer/scanner rather than a traditional analog reader/printer
- The total cost for each budget category on this page should be approximately equal to the costs in this detail section and on the vendor estimates
- **Remember these totals are rounded off to the nearest dollar when transferred to the *Budget Summary* sheet.**

LINE ITEM ENTRIES

Personnel –

- Show staff name, or position if new staff is to be hired, and/or existing staff who will work on the project; designate their hours as grant, local cash, and/or in-kind
- Show estimated pay rate, work hours, any benefits, total salary for each staff member, and total Personnel costs
- If benefits are included as personnel costs, this should also be shown. Note that grant funds will not cover benefit costs, but this expenditure can be designated as local cash match for new hires, or existing staff working beyond their normal/contracted hours. Salary and benefits for existing staff working on the project during their normal work day are claimed under in-kind match

Supplies –

- List the type, quantity and cost of the desired supplies and materials; provide a per-unit cost, number of units, and total/s.
- Supplies may be covered by grant funds, purchased new with local cash as cash match, or as in-kind match designating the value of agency existing supplies that will be used on the project

Travel –

- Indicate the destination and reason for travel.
- Show the number of trips, mileage per trip (to a destination and back), and the total cost per trip at the local reimbursable rate, or at the current state rate of 33 cents per mile, whichever is lower. Typically grant funds and/or cash match cover travel, only in rare instances will in-kind apply.
- When appropriate, meal and lodging costs are listed and included in this budget category

Vendors –

- Provide an estimated cost for microfilming a designated selection of records. Indicate the per image, per 1000-image rate, or per volume rate and the total number of estimated images or volumes as the cost basis for your project
 - Copies of vendor/s estimate/s should be included as attachment/s to your application
 - In-kind contribution cannot be claimed for vendors: Agency personnel costs associated with this budget category should be incorporated within the Personnel line
- ✓ ***Records must be older than the current 5 years for filming, unless they are included as part of a longer time frame, or extenuating circumstances, for example a mold problem, are adversely affecting the current records. Be sure to include this information in your project narrative.***
- ✓ ***Microfilm storage costs are not eligible project costs***

Consultant/s –

- Indicate the general services the consultant will provide in addition to salary and other related compensation costs
- Copies of the consultant's fee estimate or cost proposal and resume should be included as an attachment to your application

NOTE: Awarded projects must send a copy of the service contract and a copy of any publication/s produced by the consultant to the Grant Administrator as they are available

Other – This category can include

- Grant or local cash match cost for such things as newspaper ads for bids
- In-kind items, such as utilities, space, etc. provided as a local match. These will require an explanation of how such values were determined
- The cost of appropriate, project-related equipment to be purchased solely with local funds and designated as cash match.

NOTE: It is not necessarily advantageous to increase the total project cost with additional budget items or excessive in-kind as the local cash match dollar amount will increase in proportion to the total project cost.

Shelving –

- **ONLY** industrial-type metal shelving costs can be included at the 70% grant funded level. These shelving units generally consist of:
 - Four 13- gauge round-edge angle-upright posts drilled with holes at standard intervals
 - The shelves (ex. 30” by 42”) are attached with stove bolts and nuts
 - Depending on the height of the unit, bracings may be necessary as an additional shelving unit component
 - Other shelving with similar construction may also qualify at the 70% grant funding level, please check with the grant administrator or the local field archivist
 - NOTE: A basic info sheet on record room shelving, storage boxes, and selected appropriate equipment is available upon request from the grant administrator
 - ***All other types shelving e.g. non-standard industrial shelving, compact or mobile shelving, open lateral files, etc. is funded at the 50% local cash match level***
 - **Wood or plastic shelving is not funded**
- List the per-unit cost, the number of units desired, and the total shelving cost. Any vendor shipping and/or installation charges are also included here
 - In-kind contribution cannot be claimed for shelving costs: agency personnel costs associated with this budget category are incorporated in the Personnel line if appropriate

Equipment – All other types of project appropriate equipment is funded at the 50% local cash match level.

- List equipment here and show the per-item and total costs.
- Equipment maintenance costs are ineligible project costs
- It is best not to provide make and model names/numbers, but do indicate more generic specifications or capacity or a given item. General terms for equipment items, rather than a detailed listing of specific component parts, should be entered on the *Budget Summary* sheet; for example, Reader/Printer
- Renovation supplies and materials should be indicated in generic terms on the *Budget Summary* sheet (ex. Electrical fixtures and labor), but the breakdown should be more detailed in this narrative section. Show the per-item charge, number of items and total cost. Component supplies for secure-

storage, basic construction, security, or fire suppression systems are included in this budget category.

- Capital improvements, such as ground-up construction of new additions to existing buildings, or the installation of HVAC systems are ineligible project components. Please call the grant administrator if your renovation components may be questionable.
- Computer hardware, software and services should be detailed and justified here with per-item and total cost indicated. Again, use generic terms; if reference is made to specific items/products use the phrase “similar to [a known commercial product]

Funding Source –

- Indicate the source of your local match funds, i.e. tax levy, fees, private donation, etc.
- Explain the need for grant funds and why local funds are not available to fully fund the project

Interest –bearing Account –

- Identify the banking institution in which your grant payments will be deposited
- Interest earned must be reported ; accommodation will be made in the Final Report to incorporate these funds

Accounting Methods and Audit Procedures –

- What agency, department, or staff manages your finances
- Are existing fiscal checks and balances in place with this arrangement
- Who audits your agency and when was your last financial report or audit done

SAMPLE 3.3.4 Budget and Financial Considerations

6. Budget Detail, Explanation, and Justification

Personnel – I.B. Gooden estimated 140 hours at \$15.00	= \$2,100
Approximately 26.5 hours grant funded / \$ 400	
6.5 hours cash match / \$ 102	
106.5 hours in-kind / \$ 1598	
 Supplies – Boxes (12x15x10) approximately 80 at 25 cents each	= \$ 20
Folders (Letter size) approximately 10 boxes at \$5.00 each	= \$ 50
Assorted misc. office supplies, ex. Markers, heavy duty tape, etc.	= \$ 30
	\$ 90
 Vendor Estimate – 54,117 pages at 8.5 cents per page	= \$ 4599.95
 Shelving – estimated 10 units at \$120 per unit	= \$ 1200
 Microfilm cabinet – 1 base unit with approximately 5 add-on drawer units	= \$ 350
	\$ 7989.95

7. Funding Source

The county budget is based on tax revenue; local match will be budgeted out of county funds. Due to a declining revenue base the county is unable to meet the full cost of this records management and preservation project.

8. Interest-bearing Account Information

Carnegie Pittman Central Bank

9. Accounting Methods and Audit Procedures

The county treasurer manages all accounts according to standard accounting practices. The county is audited annually with the last audit completed by Bosh, Nosh and Tuttle in 2003.

3.3.5 Related Evaluation Factors

Statement of Previous Actions –

- What other records management and/or preservation projects have been completed
- Were they managed entirely in-house; with the assistance of a Local Records Field Archivist; in conjunction with Local Records' grant/s; funded by other grants (identify), or with other outside sources of funding
- Briefly describe the activity/activities and result/s

Impact of this Project and its Importance in Terms of Long-Range Planning –

- Describe the broader effect of meeting your objectives
- How will this project fit into your agency's overall management, preservation and access plan

Future Records Management and Preservation Projects –

- Are similar or supportive projects considered by the entity
- How will future activities be funded

SAMPLE 3.3.5 Related Evaluation Factors

10. Statement of Previous Actions

Our paper records have not been organized or maintained in the most effective manner and the records scattered in different office areas and locations.

Minimal microfilming was completed in the 1970's by the county clerk's office. The county paid for the filming services by a vendor who is no longer in business: the records were not produced to Local Records standards.

11. Impact of this Project and its Importance in Terms of Long-Range Planning

The Commission expects this project to initiate an improved records management process that will maintain good records practice and result in improved staff and constituent access. We consider this the first step in an on-going process to eventually microfilm all permanent county records to ensure critical information is secure.

12. Future Records Management and Preservation Actions

The county will budget funds to continue this process, but will reapply for grant funds for larger projects that cannot be accommodated with strictly local dollars.

SUPPORT MATERIAL

- *Check Payee form - Required*
- Letter of funding commitment and local match from the authorized official - *Required*
- *Records to be Microfilmed form/s – When appropriate, attachment is required*
- *Reader/Printer Request form – When appropriate, attachment is required*
- Identification of services, equipment, supplies, etc. – *When appropriate, attachment is required*
- Appropriate additions or other relevant information/materials – *When appropriate, attachment is required*
- Resumes of project personnel, consultant, volunteers, etc. - *Required*
- *Electronic Fund Transfer form - Optional*

3.3.6 Support Material

Required:

- *Check Payee* form that identifies
 - The agency to whom the grant check/s will be made payable: Provide the agency name, and if appropriate, office, and the address
 - To whom a paper check and/or other payment information will be mailed: For the person to receive payments and other related information, provide an individual's name/title, agency name, mailing address and telephone number.
- *Letter/s of Commitment* should be drafted by the authorizing agency and/or the organization/s that will provide matching funds for the grant project, stating that local match will be provided. The percentage level/s of matching funds should be stated.
- *Resumes* must be provided for all staff and/or consultants who will be actively working on the project. Briefly describe each person's regular duties as well as their project responsibilities.

Project Specific:

- If they apply to your project complete the necessary *Records to be Microfilmed* and/or *Reader/Printer Request* form/s.
 - ❑ Make duplicate clean-form *Records to be Microfilmed* copies as needed (one for each series to be microfilmed)
 - ❑ Information on the reader/printer form can also assist you in selecting appropriate equipment
- Provide copies of brochures, vendor catalog pages, spec sheets, vendor estimates, consultant info, or other materials that will identify the supplies, services, equipment, etc. desired. If more than one item is printed on the page please highlight the desired commodities.
- Supplemental materials Include floor plans, sample forms, letters of support, etc. as appropriate to your project
 - ❑ For shelving or renovation projects include floor plans. These plans do not have to be to scale, but should show the storage area dimensions. Show the placement of shelving and any other equipment or furnishings.
- You may add other relevant information/materials to support your proposal; this is an optional attachment, which may include samples, photographs,

and/or descriptions of items or services that are part of the project and have not been noted or illustrated elsewhere in the application.

Optional:

IF you do not have an active EFT account with the State, complete the *Electronic Fund Transfer* form to establish this direct deposit option instead of receiving a paper check. The form and instructions to complete the form are in the application packet.

CHECK PAYEE FORM

Missouri Secretary of State
Local Records Preservation Program
FY 2005 Grant Application
CHECK PAYEE FORM

This form identifies the agency/institution/organization grant checks will be made payable to and the individual designated to receive mailed checks if electronic direct deposit is not requested.

Check Payee Information:

1. List the name and address of the check payee – do not include an individual's name, only the name and address of the agency to which the check must be made payable.

AGENCY: Pitt County

ADDRESS: 37 Courthouse Square
Address, city, zip

Whiteacres MO 65655

2. Please indicate the individual to whom grant payments should be mailed. This person may be the project contact, or other designated individual representing the applicant or authorizing agency. **A paper check and/or other payment information will be mailed directly to this individual.**

NAME/TITLE: Pitt County Treasurer

ADDRESS: 37 Courthouse Square
Address, city, zip)

Whiteacres MO 65655

TELEPHONE: 213-546-8797

3.3.6-B Records to be Microfilmed

This form must accompany a grant application for microfilming. **Provide one form for each records series.**

Municipal Records Manual, page 9, entry 0037

SHOW ABOVE THE **RETENTION MANUAL TITLE, PAGE/ENTRY NUMBER OF THIS PERMANENT RECORD**

Office of Origin: Anytown City Clerk

Records Series Title: Ordinances

Inclusive Dates: 1879-1999

Arrangement: Chronological. Indexed Numerically.

Information Content: Ordinance number, title, statement of provisions, date ordinance was
passed/approved

Format

- ☐ Bound volumes
- ☒ Loose leaf files
- ☐ Continuous computer paper
- ☐ Aperture cards

Quantity

- ☐ Number of volumes: _____
- ☐ Estimate number of pages per volume: _____
- ☒ Estimate number of loose leaf pages: 620
- ☐ Estimate number of aperture cards: _____ Images per card: _____

Size(s)

- ☐ 5 x 7
- ☒ 8½ x 11
- ☒ 8½ x 14
- ☐ 11 x 17
- ☐ Other: (Describe / Explain) _____

Pages per 35mm frame:

- ☒ 1
- ☐ 2 (Requires Local Records approval)
- ☐ Other: (Describe / Explain) _____

Additional Information: Approximately 80% of the Ordinances date from 1940

FY 2005 Application Checklist

Use this checklist to review your application before submitting it. Additional information may be requested for Applications during the pre- review period; do not leave items incomplete, or missing. Be sure you have followed the specific instructions provided in Section 3 to complete all entries. Application pages must be submitted in their correct order.

APPLICANT IDENTIFICATION

- ☐ Senate/Representative Districts Provided
- ☐ Applicant, Government Entity and Project Contact Identified
- ☐ Federal Employer Identification Number (FEIN) Provided
- ☐ "YES" or "NO" Decision Checked for Electronic Fund Transfer
- ☐ Application Preparer Identified

BUDGET SUMMARY

- ☐ Summary Sheet Completed with Correct "Budget Detail" Page Totals
- ☐ Authorized Official's Signature Is Affixed

PROJECT PROPOSAL NARRATIVE includes

- ☐ Statement of Purpose
- ☐ Project Summary
- ☐ Timeline and Detailed Work Plan
- ☐ Project Objectives
- ☐ Evaluation of Project Results

BUDGET AND FINANCIAL CONSIDERATIONS

- ☐ Budget Detail, Explanation and Justification Provided
- ☐ Funding Source Indicated
- ☐ Interest-bearing Account Information Provided
- ☐ Accounting Methods and Audit Procedures Addressed

RELATED EVALUATION FACTORS

- ☐ Budget Detail, Explanation and Justification Provided
- ☐ Statement of Previous [records management/preservation] Actions Provided
- ☐ Project Impact and Importance of Project in Terms of Long Range Planning Stated
- ☐ Future Records Management and Preservation Projects Indicated

SUPPORT MATERIAL

- ☐ Check Payee form
- ☐ Letter of Commitment and match level/s from funding authority
 - Records to be Microfilmed form/s
 - Reader/Printer Request form
 - Identification of services, equipment, supplies, etc.
 - Appropriate Additions (floor plans, sample forms, and letters of support, etc.) and other relevant information, if applicable
 - Resumes of project personnel, consultant, volunteers, et
 - ACH/EFT form (Electronic Fund Transfer) to set up direct deposit of grant payment/s
- ✓ Send paper or binder- clipped original, plus 5 photocopied applications (stapled or clipped)
- ✓ Delivery or postmark is ensured for March 1, 2004

Application Form





Missouri Secretary of State
Local Records Preservation Program
FY 2005 Grant Application

*James C. Kirkpatrick State Information Center
PO Box 1747, Jefferson City, MO 65102-1747*

State Senate District:

State House District:

Applicant Agency:

County:

Agency Head Name, Title:

Address:

Telephone:

Fax:

E-mail:

Federal Employer Identification Number (FEIN):

Would you like your funds electronically deposited? ☐ YES ☐ NO

Authorizing Agency (if different from above):

Authorizing Official Name, Title:

Address:

Telephone:

Fax:

E-mail:

Primary Project Contact Name, Title:

Address:

Telephone:

Fax:

E-mail:

Application Prepared by (Name, Title):

Address:

Telephone:

Fax:

E-mail:

Date:

FY05 Budget Summary

Budget Category	Grant Funds (70% maximum)	Cash Match (10% minimum)	In-Kind	TOTAL (100%)
Personnel	_____	_____	_____	_____
Supplies	_____	_____	_____	_____
Travel	_____	_____	_____	_____
Vendor	_____	_____	_____	_____
Consultant	_____	_____	_____	_____
Other: Specify	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
Shelving (Standard Metal)	_____	_____	_____	_____
Subtotals	_____	_____	_____	_____
Local match must be at least 30% of				this total

Equipment: Specify	50% GRANT funds	50% CASH match		
_____	_____	_____		_____
_____	_____	_____		_____
_____	_____	_____		_____
Subtotals	_____	_____		_____
				Equipment total

Grant Funding Requested/Awarded		Complete Project Cost:		
_____		_____		

Certification of Authority to Secure and Encumber Project Funds

Printed Name/Title of Authorizing Official

Signature of Authorizing Official

Date

FY05 Project Proposal Narrative

1. Statement of Purpose

2. Project Summary

3. Detailed Timeline and Work Plan

4. Project Objectives

5. Evaluation of Project Results

FY05 Budget and Financial Considerations

6. Budget Detail, Explanation, and Justification

7. Funding Source

8. Interest-bearing Account Information

9. Accounting Methods and Audit Procedures

FY05 Related Evaluation Factors

10. Statement of Previous Actions

11. Impact of this Project and its Importance in Terms of Long-Range Planning

12. Future Records Management and Preservation Actions

SUPPORT MATERIAL

- *Check Payee form - Required*
- Letter of funding commitment and local match from the authorized official - *Required*
- *Records to be Microfilmed form/s – When appropriate, attachment is required*
- *Reader/Printer Request form – When appropriate, attachment is required*
- Identification of services, equipment, supplies, etc. – *When appropriate, attachment is required*
- Appropriate additions, ex. Floor plans, or other relevant information/materials – *When appropriate, attachment is required*
- Resumes of project personnel, consultant, volunteers, etc. - *Required*
- *Electronic Fund Transfer form - Optional*

Missouri Secretary of State
Local Records Preservation Program
FY 2005 Grant Application
CHECK PAYEE FORM

This form identifies the agency/institution/organization grant checks will be made payable to and the individual designated to receive mailed checks if electronic direct deposit is not requested.

Check Payee Information:

1. List the name and address of the check payee – DO NOT INCLUDE AN INDIVIDUAL'S NAME , only **the name and address of the agency to which the check must be made payable.**

AGENCY: _____

ADDRESS: _____
Address, city, zip

3. Please indicate the individual to whom grant payments should be mailed. This person may be the project contact, or other designated individual representing the applicant or authorizing agency. **The check and/or other payment information will be mailed directly to this individual.**

NAME/TITLE: _____

ADDRESS: _____
Address, city, zip

TELEPHONE: _____

Missouri Secretary of State
Local Records Preservation Program
FY 2005 Grant Application
Records to be Microfilmed

*This form **must** accompany a microfilming grant application. Provide one form for each record series.*

SHOW ABOVE THE **RETENTION MANUAL TITLE, PAGE/ ENTRY NUMBER OF THIS PERMANENT RECORD**

Office of Origin: _____

Records Series Title: _____

Inclusive Dates: _____

Arrangement: _____

Information Content: _____

Format

- ☐ Bound volumes
- ☐ Loose leaf files
- ☐ Continuous computer paper
- ☐ Aperture cards

Quantity

- ☐ Number of volumes:
- ☐ Estimate number of pages per volume:
- ☐ Estimate number of loose leaf pages:
- ☐ Estimate number of aperture cards: Images per card:

Size(s)

- ☐ 5 x 7
- ☐ 8½ x 11
- ☐ 8½ x 14
- ☐ 11 x 17
- ☐ Other: *(Describe / Explain)* _____

Pages per 35mm frame:

- ☐ 1
- ☐ 2 *(Requires Local Records approval)*
- ☐ Other: *(Describe / Explain)* _____

Additional Information: _____

Missouri Secretary of State
Local Records Preservation Program
FY 2005 Grant Application
Reader/Printer Request Form

1. Do you currently have records on microfilm?
 - ☐ YES
 - ☐ NO
2. How often is the microfilm used?
 - ☐ Daily
 - ☐ Weekly
 - ☐ Monthly
3. Quantity and Film Size:
 - ☐ _____ 35mm
 - ☐ _____ 16mm
4. Will you need a microfiche attachment?
 - ☐ YES
 - ☐ NO
5. Will you need a workstation?
 - ☐ YES
 - ☐ NO
6. What type of reader/printer or scanner equipment are you requesting?
 - ☐ Analog
 - ☐ Digital
 - ☐ Other: _____
7. Attach Reader/Printer Specifications and Costs, including those for delivery, installation and training. ***Grant project funds or local match cannot be used for the purchase of maintenance contracts.***

NOTE:

Reader/Printers may be purchased off State of Missouri contracts **if** bid/s were awarded. Contact the Office of Administration, Division of Purchasing and Materials Management for information at Phone: 573-751-2387 or E-mail: purchmail@mail.state.mo.us or the grant administrator.



STATE OF MISSOURI
OFFICE OF ADMINISTRATION
VENDOR ACH/EFT APPLICATION

SECTION A: TO BE COMPLETED BY SUBMITTING VENDOR (INCLUDING STATE EMPLOYEE) INSTRUCTIONS ON REVERSE SIDE

DESCRIPTION <input type="checkbox"/> NEW <input type="checkbox"/> CHANGE <input type="checkbox"/> CANCEL		
TAXPAYER ID TYPE (CHECK ONE) <input type="checkbox"/> 1 = FED BUS ID <input type="checkbox"/> 2 = SSN	TAXPAYER ID NUMBER	VENDOR NUMBER (11 DIGITS)
VENDOR NAME (30 CHARACTERS MAXIMUM)		LEGAL NAME OF ENTITY OR INDIVIDUAL (30 CHARACTERS MAXIMUM)
ADDRESS		TELEPHONE NUMBER WITH AREA CODE
CITY	STATE	ZIP CODE

SECTION B: TO BE COMPLETED BY STATE EMPLOYEE ONLY (OTHER VENDOR SKIP THIS SECTION)

HOME ADDRESS	HOME PHONE NUMBER
CITY	STATE
	ZIP CODE

SECTION C: TO BE COMPLETED BY SUBMITTING VENDOR (INCLUDING STATE EMPLOYEE)

FINANCIAL INSTITUTION NAME	IF CHANGE PLEASE INDICATE PREVIOUS FINANCIAL INSTITUTION NAME
FINANCIAL INSTITUTION ADDRESS	FINANCIAL INSTITUTION TELEPHONE NUMBER
CITY	STATE
	ZIP CODE
DEPOSITOR ROUTING NUMBER	IF CHANGE PLEASE INDICATE PREVIOUS ROUTING NUMBER
DEPOSITOR ACCOUNT NUMBER	IF CHANGE PLEASE INDICATE PREVIOUS ACCOUNT NUMBER
DEPOSITOR ACCOUNT TYPE (CHECK ONE) <input type="checkbox"/> SAVINGS <input type="checkbox"/> CHECKING	

SECTION D: FINANCIAL INSTITUTION CERTIFICATION

I certify that the above Depositor Routing Number and Depositor Account Number to be true and accurate for the Vendor.

FINANCIAL INSTITUTION NAME	AUTHORIZED SIGNATURE	DATE
----------------------------	----------------------	------

SECTION E: VENDOR AUTHORIZATION

☐ I (we) hereby authorize the State of Missouri, to initiate credit entries to my (our) account indicated above at the depository financial institution named above, and to credit the same such account. I (we) acknowledge that the origination of ACH transactions to my (our) account must comply with the provisions of U.S. law.

This authorization is to remain in full force and effect until the State of Missouri, Office of Administration has received written notification from me (or either of us) of its termination in such time and in such manner as to afford the State of Missouri and the financial institution a reasonable opportunity to act on it.

☐ I (we) hereby cancel my/our ACH/EFT authorization.

AUTHORIZED VENDOR REPRESENTATIVE OR STATE EMPLOYEE SIGNATURE	DATE
--	------

SECTION F: STATE AGENCY USE ONLY

I have reviewed the Vendor information for completeness and accuracy

AUTHORIZED AGENCY SIGNATURE	DATE	TELEPHONE NUMBER
-----------------------------	------	------------------

SECTION G: OFFICE OF ADMINISTRATION USE ONLY

I have reviewed and entered the above information

SIGNATURE	DATE	VERIFICATION SIGNATURE	DATE
-----------	------	------------------------	------

VENDOR ACH/EFT APPLICATION INSTRUCTIONS

Fill in the appropriate boxes as described below

SECTION A: TO BE COMPLETED BY SUBMITTING VENDOR (INCLUDING STATE EMPLOYEE)

DESCRIPTION

Check the appropriate box for this submission

TAXPAYER ID TYPE

Check 1 if your taxpayer ID is a Federal Employers Identification number (FEIN) or 2 if your taxpayer ID is a Social Security Number (SSN)

TAXPAYER ID NUMBER

Enter the FEIN or SSN associated with the legal name of the entity or individual

VENDOR NUMBER (11 DIGITS)

If known, enter the vendor number assigned to your business or individual by the State of Missouri

VENDOR NAME

Enter the name of the entity or individual: **Individual** - Enter your name (Last Name, First Name and Middle Initial)

Sole Proprietor - Enter name of Business **Corporation** - Enter your Doing Business As (DBA) name **Other** - Enter your entity's name

LEGAL ENTITY NAME

Enter Legal Name of Entity or Individual as filed with IRS: **Individual** - Enter your name (Last Name, First Name and Middle Initial)

Sole Proprietor - Enter owner's name (Last Name, First Name and Middle Initial) **Corporation** - Enter your name as it appears on the charter or other legal document creating it and as filed with the IRS **Other** - Enter your entity's name as filed with the IRS

ADDRESS

Enter your mailing address

TELEPHONE NUMBER

Enter your telephone number with area code

CITY, STATE, ZIP CODE

Enter your city, state and zip code for the street address

SECTION B: TO BE COMPLETED BY STATE EMPLOYEE ONLY

HOME ADDRESS

Enter your home address

HOME PHONE NUMBER

Enter your home phone number

CITY, STATE, ZIP CODE

Enter your city, state and zip code for the address

SECTION C: TO BE COMPLETED BY SUBMITTING VENDOR

FINANCIAL INSTITUTION NAME, ADDRESS, CITY, STATE, ZIP CODE, PHONE NUMBER

Enter in this information provided to you by your bank

NOTE: If this is a request for a "CHANGE" please provide your previous financial institution name in the space provided

DEPOSITOR ROUTING NUMBER

Enter your financial institution's routing number

NOTE: If this is a request for a "CHANGE" please provide your previous routing number in the space provided

DEPOSITOR ACCOUNT NUMBER

Enter your account number

NOTE: If this is a request for a "CHANGE" please provide your previous account number in the space provided

DEPOSITOR ACCOUNT TYPE

Please select type of account (savings or checking)

SECTION D: FINANCIAL INSTITUTION CERTIFICATION

FINANCIAL INSTITUTION CERTIFICATION

Application must be signed by a representative of your bank after bank verification

NOTE: If this section of the application is not completed the application will be returned and not processed

SECTION E: VENDOR AUTHORIZATION

VENDOR AUTHORIZATION

Must be signed by an authorized representative or state employee before application can be processed by the Office of Administration, Division of Accounting

MAILING INSTRUCTIONS

Fax completed application to the Office of Administration at 573-526-9813. If you do not have access to a fax machine, mail the completed application to the Office of Administration, Division of Accounting, Truman State Office Building, PO Box 809, Jefferson City, MO 65102. The application may also be mailed to Agency you are doing business with at this time for processing

GENERAL INSTRUCTIONS

If the applicable sections of this application are not complete, the application will not be processed by the Office of Administration, Division of Accounting
ACH transactions will be effective approximately one month after the application is approved by the Office of Administration, Division of Accounting

Changing Financial Institution or Depositor Account (within the same Financial Institution)-All deposits will continue to be deposited into your present account until the Office of Administration, Division of Accounting has been notified that you have changed your banking information. At which time you will need to submit a new Vendor ACH/EFT Application making sure to check the appropriate "CHANGE" box at the top of the form, and completing the applicable fields on this form

NOTE: Failure to obtain the Financial Institution Certification may result in delayed payments to vendor. Do not close an old account until the first transaction has been deposited into your new account.

Administrative Rules



5. ADMINISTRATIVE RULES

Code of State Regulations

Title 15 Elected Officials

Division 30 Secretary of State

Chapter 45 Records Management

15 CSR 30-45.030 Local Records Grant Program Administration

PURPOSE: This rule outlines the authority of the grants-in-aid program for local records preservation through the Office of the Secretary of State.

- (1) The local records grant program, administered by the Office of the Secretary of State, provides financial assistance to local government officials to support records management and preservation efforts, particularly for records of permanent retention. This grants-in-aid program is a significant effort in the overall mission of the agency to enhance the quality of archival preservation and public access to records of enduring value.
 - (A) Eligible applicants include all local government entities supported by a tax levy.
 - (B) Ineligible applicants include:
 1. Individuals;
 2. State agencies (local public records housed by state agencies may be included in a grant application that is submitted and administered by the local official who has statutory authority over the records);
 3. Private organizations (local public records housed by private organizations may be included in a grant application that is submitted and administered by the local official who has statutory authority over the records);
 4. Federal agencies.
 - (C) Procedures and Evaluation of Applications:
 1. The Missouri Historical Records Advisory Board (MHRAB) recommends grant:
 - A. Activities, requirements and objectives;
 - B. Cost-sharing contributions, budget structure, payment benchmarks and accounting guidelines;
 - C. Calendars.
 2. The MHRAB reviews and evaluates grant applications and recommends funding levels for award to the secretary of state.
 3. The process to be followed in writing and submitting a grant proposal are found in the *Local Records Preservation Program Guidebook and Application*. All applicable guidelines, procedures and standards relating to the local records preservation grants-in-aid program are detailed in *Local Records Preservation Program Guidebook and Application* and the *Guidelines for Local Records Microfilming*.
 - A. Any interested person may obtain the most current version *Local Records Preservation Program Guidebook and Application* from either the Local

Records Program, P.O. Box 1747, Jefferson City MO 65102, 573-751-2798, or the Secretary of State web site:

www.sos.mo.gov/archives/localrecs/grants/

- B. Paper copies of the most current version *Guidelines for Local Records Microfilming* are available from the Local Records Program, P.O. Box 1747, Jefferson City MO 65102, 573-751-2798.

*AUTHORITY: sections 59.319 and 109.221, RSMo 2000. * Emergency rule filed June 19, 1991, effective June 29, 1991, expired Oct. 28, 1991. Original rule filed June 19, 1991, effective Oct. 31, 1991. Amended: Filed Nov. 6, 1991, effective May 14, 1992. Rescinded and readopted: Filed July 27, 1999, effective Feb. 29, 2000. Rescinded and readopted: Filed Jan 18, 2002, effective July 30, 2002.*

**Original authority: 59.319, RSMo 1969, amended 1989, 1994 and 109.221, RSMo 1989, amended 1990, 1993, 1995, 1998.*

Vendor Information





State of Missouri
Office of Secretary of State
PO Box 1747
Jefferson City, MO 65102
(573) 751-9047

LOCAL RECORDS GRANT PROGRAM

VENDOR LIST

This list is provided as a service for the convenience of local government entities and does not constitute an endorsement by the Local Records Preservation Program for any potential vendor. No guarantee of quality of work is made or implied.

The local government entity is responsible for making arrangements directly with the vendors. Any agreement entered into is a contract between the local government and the vendor, and does not include the Local Records Preservation Program. However, RSMo 109, paying special attention to 109.241 for quality control, governs all microfilm contracts for local government work.

last updated October 1, 2002

CONTENTS

- 6.2.1 Microfilm Equipment/Service
- 6.2.2 Off-Site and Cold Storage Facilities
- 6.2.3 Shelving and Cabinets
- 6.2.4 Compact Shelving
- 6.2.5 Archival Supplies
- 6.2.6 Storage Boxes
- 6.2.7 Care of Books
- 6.2.8 Preservation Imaging and Photocopying
- 6.2.9 Duplication of Still Photographs
- 6.2.10 Renovating Historic Structures
- 6.2.11 Integrated Pest Management
- 6.2.12 Disaster Planning and Prevention
- 6.2.13 Disaster Recovery
- 6.2.14 Industrial Hygienists
- 6.2.15 Environmental Control and Monitoring
- 6.2.16 Air Quality Control
- 6.2.17 Document Destruction
- 6.2.18 Preservation Framers
- 6.2.19 Paper Conservators
- 6.2.20 Photo Conservators
- 6.2.21 Paintings Conservators
- 6.2.22 Textile Conservators
- 6.2.24 Objects Conservators
- 6.2.24 Architectural Conservators

NOTE:

A current contact list for project consultants is available from Local Records upon request

Phone: 573-751-2798 Local Records Grant Administrator
573-751-9047 Local Records General Inquiry

US Mail: PO Box 1747
Jefferson City MO 65102-1747

MICROFILM EQUIPMENT/SERVICE

6.2.1

American Micro

www.americanmicrokc.com
1933 Troost
Kansas City, MO 64108
(816) 221-0123
1-800-859-1100
FAX (816) 221-2458
info@americanmicrokc.com

Anacomp

www.anacomp.com
15378 Avenue of Science
San Diego, CA 92128
(858) 716-3400
FAX (858) 716-3775

Casey Associates, Inc.

www.caseyinc.net
2129 Washington Street
Kansas City, MO 64108
(816) 221-2010
1-877-902-2010
FAX (816) 221-2494
sales@caseyinc.net

Casey Associates, Inc.

www.caseyinc.net
4250 East 7th, Suite C
Joplin, MO 64801
(417) 782-3282
1-877-902-2010
FAX (417) 782-4828
sales@caseyinc.net

DST Output

www.output.net
2519 Madison
Kansas City, MO 64108
(816) 221-01234
FAX (816) 435-1482

Document Imaging Systems Corp.

www.discorp.net
1520 Washington Ave.
St. Louis, MO 63103
(314) 436-2800 ext. 370
1-800-489-8303 ext. 370
FAX (314) 421-2642
info@disccorp.net

Document Management Solutions

11920 Grandview Rd.
Grandview, MO 64030
(816) 761-7710
FAX (816) 761-8676
diglebe@sbcglobal.net

Dynamic Computer Solutions

1508 Grand
Kansas City, MO 64108
(816) 480-3800
1-800-520-4566
FAX (816) 480-3899
info@dskc.com

Dynamic Computer Solutions

www.dcskc.com
403B Vandiver Dr.
Columbia, MO 65202-1510
573-443-4419
1-800-580-4419
FAX (573) 449-0983
info@dskc.com

Dynamic Computer Solutions

www.dcskc.com
1940 Innerbelt Business Center Dr.
St. Louis, MO 63114-5760
(314) 890-8120
1-800-575-4566
FAX (314) 890-0742
info@dskc.com

Microfilm Equipment/Services, cont.

Edco – The Document People

www.edcodoc.com
1351 N. Belcrest
Springfield, MO 65802
(417) 862-4351
FAX 1-800-999-3551
bfrazier@edcodoc.com

Imaging Systems, Inc.

www.imagingsystems.net
901 Watson Ave.
Madison, WI 53713
(608) 276-5559
FAX (608) 276-5539
isysken@execpc.com

J & J Microfilming

P.O. Box 5415
Bella Vista, AR 72714
(479) 876-5921
jimsperry@nwark.net

Micro Images

www.micro-images.com
1614 Avenue M
Lubbock, TX 79401
1-800-765-0084
FAX (806) 744-1775

Micro Innovations

www.microinnovationsinc.com
2160 N. Fox Hollow Dr. West
Nixa, MO 65714
(417) 725-3202
1-800-882-7107
FAX (417) 725-3103

Microfilm & Imaging of Kansas City

www.mikc.com
608 NW Platte Valley Drive
Riverside MO 64150
(816) 455-8667
FAX 816-455-4350
freds@mikc.com

Micrographic Services

www.micrographicservices.com
100 N. Main St.
St. Charles, MO 63301
(636) 946-2715
FAX (636) 946-3148
FilmNScan@aol.com

Microtek

www.microtekstl.com
1277 North Warson Road
St. Louis, MO 63132
(314) 989-9500
1-800-254-2808
FAX (314) 989-9595
sales@microtekstl.com

Mid-Continent Micrographics, Inc.

702 Jules
St. Joseph, MO 64501
(816) 364-5200
1-800-466-3456
FAX (816) 364-0889
glennpmcm@magiccablepc.com

Missouri Document Solutions

www.mdsspf.com
3230 D South National
Springfield, MO 65807
(417) 823-9091
FAX (417) 823-9925
mdsca@sbcglobal.net

OFF-SITE AND COLD STORAGE FACILITIES

6.2.2

Americold Logistics

www.americold.net
10 Glenlake Parkway South
Suite 800
Atlanta, GA 30328
(678) 441-1400
FAX (678) 441-6847

Edco – The Document People

www.edcodoc.com
1351 N. Belcrest
Springfield, MO 65802
(417) 862-4351
FAX 1-800-999-3551
bfrazier@edcodoc.com

Frostar

34 Howard Street
Boston, MA 02119
(617) 445-4490
FAX (617) 445-1608

Hazeltine Vaults

7603 Hazeltine Ave.
Van Nuys, CA 91405
(818) 781-7049
FAX (818) 781-9376
jerileah@yahoo.com

Hollywood Vaults

www.hollywoodvaults.com
1780 Prospect Place
Santa Barbara, CA 93103
(805) 569-5334
FAX (805) 569-1657
vault@hollywoodvaults.com

Kentucky Underground Storage, Inc.

www.kentuckyunderground.com
3830 High Bridge Road
Wilmore, KY 40390
(859) 858-4988
FAX (859) 858-8497

Mid-Continent Micrographics, Inc.

702 Jules
St. Joseph, MO 64501
(816) 364-5200 or
1-800-466-3456
FAX (816) 364-0889
glennpmcm@magiccablepc.com

The Safe Deposit Company

home.swbell.net/compuvlt
515 S. Lindbergh Blvd.
Frontenac, MO 63131
(314) 991-3858
FAX (314) 991-2503

Iron Mountain Records Management

www.ironmountain.com
1000 Campus Dr.
Collegeville, PA 19426
(913) 888-1390
brian.chisum@ironmountain.com

WRS Motion Picture and Video Laboratory

www.wrslabs.com
1000 Napor Boulevard
Pittsburgh, PA 15205
1-800-345-6977
(412) 937-7700
FAX (412) 922-2418
jackn@wrslabs.com

SHELVING AND CABINETS

6.2.3

Conner Business Systems

www.connerbs.com
1860 Fenpark
Fenton, Missouri 63026
(636) 305-1400
1-800-967-7542
FAX (636) 305-1404
gary@connerbs.com

County Binders

P.O. Box 42
Waukegan, IA 50263-0042
1-800-772-2896
(515) 987-2162
FAX (515) 987-2163
bookguy@aol.com

Delta Designs, Ltd.

www.deltadesignsltd.com
1535 NW 25th St.
Topeka, KS 66618
(785) 234-2244
FAX (785) 233-1021
bdanielson@deltadesignsltd.com

Edco – The Document People

www.edcodoc.com
1351 N. Belcrest
Springfield, MO 65802
(417) 862-4351
FAX 1-800-999-3551
bfrazier@edcodoc.com

Indoff, Inc.

www.indoff.com
4011 E. Red Bridge Rd.
Kansas City, MO 63137
(816) 765-0075
FAX (816) 765-4055
scrwonder@aol.com

Indoff, Inc.

www.indoff.com
2393 W. Cantbury
Springfield, MO 65810
(417) 889-6545
FAX (417) 889-6431
indoffozarks@mchsi.com

Industrial Shelving Systems

www.industrialshelving.com
455 E. Elliot Ave.
St. Louis, MO 63122
(314) 965-6500
FAX (314) 965-4500
mberkel@industrialshelving.com

Mid-Continent Micrographics, Inc.

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St. Joseph, MO 64501
(816) 364-5200 or
1-800-466-3456
FAX (816) 364-0889
glennpmcm@magiccablepc.com

Missouri Vocational Enterprises

www.corrections.state.mo.us/division/rehab/mve.htm
P.O. Box 236
Jefferson City, MO 65102
(573) 751-6663
1-800-392-8486

The Peterson Group

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1-800-585-8541
FAX (573) 472-1293
info@scheffersofbm.com

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FAX (816) 421-2162
sigginsinfo@siggins.net

Steel Fixture Mfg. Company

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Topeka, KS 66607
(785) 233-8911
1-800-342-9180
FAX (785) 233-8477
stan@steelfixture.com

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www.oa.state.mo.us/purch/surplus.html
117 North Riverside Dr.
Jefferson City, MO 65101
(573) 751-3415
FAX (573) 751-1264
steffm@mail.oa.state.mo.us

TAB Products Co.

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Mayville, WI 53050
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FAX 1-800-304-4947
info@tab.com

Advanced Storage & Retrieval Systems of America

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225 West 34th Street, Suite 1708
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(212) 760-1607
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www.borroughs.com
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FAX (740) 374-9953
sales@kardex.com

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Jacksonville IL 62650
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Montel Inc.

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Satellite Beach, FL 32937
1-800-772-7562
FAX (321) 777-3539
system@montel.com

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FAX (314) 343-3588
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criusa@conservationresources.com

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FAX (816) 781-7021

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(253) 924-2345
FAX (501) 455-5357

For additional assistance in locating and selecting a conservator, please contact the American Institute for Conservation at (202) 452-9545 or visit their website at <http://aic.stanford.edu/>. You may also contact the Missouri Secretary of State's conservation lab at (573) 526-3866 for conservation information.

Book Conservation**Richard Baker**

Richard Baker Conservation
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FAX (816) 364-0889
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University Bindery Inc.

www.icibinding.com
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FAX (314) 918-7133
ubi@icibinding.com

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100 Cambridge St.
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FAX (617) 242-3764
info@acmebook.com

Digital Preservation

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(314) 378-8054
FAX (636) 530-7086
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Agawam, MA 01001
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FAX (413) 274-6934
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FAX (636) 530-7086
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Full Spectrum Photo

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Jefferson City, MO 65101
(573) 635-0250
lloyd@fullspectrumphotoaudio.com

Northeast Document Conservation Center

www.nedcc.org
100 Brickstone Square
Andover, MA 01810-1494
(978) 470-1010
FAX (978) 475-6021
nedcc@nedcc.org

Building Research Council

brc.arch.uiuc.edu
1 East St. Mary's Road
Champaign, IL 61820
1-800-336-0616
(217) 333-1801
FAX (217) 244-2204
arch/orders@uiuc.edu

Landmark Facilities Group, Inc.

www.lfginc.com
252 East Avenue
Norwalk, CT 06855
(203) 866-4626
FAX (203) 866-8019
postmaster@lfginc.com

INTEGRATED PEST MANAGEMENT

6.2.11

For information on integrated pest management, please contact the Missouri Secretary of State's conservation lab at (573) 526-3866.

General Information

Chicora Foundation, Inc.

www.chicora.org
PO Box 8664
Columbia, SC 29202
(803) 787-6910
FAX (803) 787-6910
information@chicora.org

National Pest Control Association

www.pestworld.org
8100 Oak Street
Dunn Loring, VA 22027
(703) 573-8330
FAX (703) 573-4116

Supplies and Services

Insects Limited, Inc.

www.insectslimited.com
16950 Westfield Park Road
Westfield, IN 46074
(317) 896-9300
1-800-992-1991
FAX (317) 867-5757
InsectsLtd@aol.com

Pest Control Services

www.termitesonly.com
Dr. Thomas Parker
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(610) 284-6249
FAX (610) 284-4494
bugman22@aol.com

Keepsafe Systems USA

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1-800-683-4696
FAX (416) 703-5991
info@keepsafe.ca

Blast Freezing Facilities

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Atlanta, GA 30328
(678) 441-1400
FAX (678) 441-6847

Munters Moisture Control Services

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11040 Linville Dr. Suite N
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1-800-959-8650
(314) 781-5550
FAX (314) 845-6621
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Skokie, IL 60076
(847) 679-4756
FAX (847) 679-4191
mfd7326@aol.com

For information on disaster planning and prevention, please contact the Missouri Secretary of State's conservation lab at (573) 526-3866.

General Information

Chicora Foundation, Inc.

www.chicora.org
PO Box 8664
Columbia, SC 29202
(803) 787-6910
FAX (803) 787-6910
information@chicora.org

National Fire Protection Association

www.nfpa.org
1 Batterymarch Park
P.O. Box 9101
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(617) 770-3000
Fax: (617) 770-0700

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Marinette, WI 54143-2542
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FAX 1-800-543-9822

Halotron, Inc.

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3770 Howard Hughes Parkway #300
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(702) 735-2200
FAX (702) 735-4876
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Fenwal Protection Systems

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American Freeze-Dry, Inc.

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6.2.14

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(517) 321-2638
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abih@abih.org

American Conference of Governmental Industrial Hygienists, Inc.

www.acgih.org
1330 Kemper Meadow Drive
Cincinnati, OH 45240
(513) 742-2020
FAX (513) 742-3355

American Industrial Hygiene Association

www.aiha.org
2700 Prosperity Avenue, Suite #250
Fairfax, VA 22031
(703) 849-8888
FAX (703) 207-3561
infonet@aiha.org

ENVIRONMENTAL CONTROL AND MONITORING

6.2.15

For information on environmental control and monitoring, please contact the Missouri Secretary of State's conservation lab at (573) 526-3866.

General Information

Chicora Foundation, Inc.

www.chicora.org
PO Box 8664
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(803) 787-6910
FAX (803) 787-6910
information@chicora.org

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FAX (888) 822-6937
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1-800-441-1107
(972) 635-9564
FAX 1-800-929-9712
FAX (972) 635-2713

DOCUMENT DESTRUCTION

6.2.17

Secure-Shred

www.secure-shred.net
1026 E. Lakewood
Springfield, MO 65810
1-866-377-4733
(417) 885-1101
FAX (417) 885-1101
eric@secure-shred.net

Security-Shred

www.securityshred.com
16240 West 110th Street
Lenexa, KS 66219
1-888-438-4118
(913) 438-4000
FAX (913) 438-8190
info@securityshred.com

PRESERVATION FRAMERS

6.2.18

For information on preservation framing, please contact the Missouri Secretary of State's conservation lab at (573) 526-3866.

Cottonstone Gallery

116 E. High Street
Jefferson City, MO 65101
(573) 634-7646

Lasting Impressions

12 McBaine Avenue
Columbia, MO 65203
(573) 874-0378
nburdick@socket.net

James Downey

Legacy Art & BookWorks, Inc.
www.legacyart.com
1010 East Broadway
Columbia, MO 65201
(573) 442-0855
1-800-776-4924
legacy@legacyart.com

PAPER CONSERVATION

6.2.19

For additional assistance in locating and selecting a conservator, please contact the American Institute for Conservation at (202) 452-9545 or visit their website at <http://aic.stanford.edu/>. You may also contact the Missouri Secretary of State's conservation lab at (573) 526-3866 for conservation information.

Richard Baker

Richard Baker Conservation
www.richardcbaker.com
1712 (Rear) South Big Bend Blvd.
St. Louis, MO 63117
(314) 781-3035
baker@richardcbaker.com

Nancy Heugh

Heugh-Edmondson Conservation Services
P.O. Box 10408
Kansas City, MO 64171-0408
(816) 283-0660
FAX (816) 283-0740
heughed@attglobal.net

Thomas M. Edmondson

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P. O. Box 10408
Kansas City, MO 64171-0408
(816) 283-0660
FAX (816) 283-0740
heughed@attglobal.net

Mark Stevenson

P.O. Box 45326
Kansas City, MO 64171
(816) 931-4922

Sheba A. Haner

721 North Taylor Avenue
Kirkwood, MO 63122
(314) 965-6814
FAX (314) 721-6172
conserv@slam.org

PHOTO CONSERVATION

6.2.20

For additional assistance in locating and selecting a conservator, please contact the American Institute for Conservation at (202) 452-9545 or visit their website at <http://aic.stanford.edu/>. You may also contact the Missouri Secretary of State's conservation lab at (573) 526-3866 for conservation information.

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PAINTINGS CONSERVATION

6.2.21

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Hal Blagbrough

4404 Grace Avenue
St. Louis, MO 63116-4302
(314) 621-3202
FAX (314) 352-8370
bgallery@prodigy.net

Paul F. Haner

St. Louis Art Museum
1 Fine Arts Drive
St. Louis, MO 63110
(314) 721-0072 ext. 260
FAX (314) 721-6172
conserv@slam.org

Sidney Larson

1408 Whitburn Drive
Columbia, MO 65203-5172
(573) 499-3802

Susan G. Wood

3002 Geyer Avenue
St. Louis, MO 63104-1517
(314) 865-4777

TEXTILE CONSERVATION

6.2.22

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Zoe Perkins

St. Louis Art Museum

1 Fine Arts Drive

Forest Park

St. Louis, MO 63110

(314) 721-0072 ext. 271

FAX (314) 721-6172

zap@slam.org

OBJECTS CONSERVATION

6.2.23

For additional assistance in locating and selecting a conservator, please contact the American Institute for Conservation at (202) 452-9545 or visit their website at <http://aic.stanford.edu/>. You may also contact the Missouri Secretary of State's conservation lab at (573) 526-3866 for conservation information.

John Barfield

910 Yeatman Avenue
St. Louis, MO 63119
(314) 963-9019

Paul L. Benson

Nelson-Atkins Museum of Art
4525 Oak Street
Kansas City, MO 64111-1873
(816) 751-1253
FAX (816) 561-7154
pbenson@nelson-atkins.org

Kathleen M. Garland

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Kansas City, MO 64111
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FAX (816) 561-7154
kgarland@nelson-atkins.org

Gary Keshner

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Creative Sculptures and Restoration
705 SE 11th Street
Lees Summit, MO 64081-3047
(816) 554-1825
FAX (816) 525-7568
GaryKeshner@CreativeRestoration.com

Marianne Russell Marti

Russell-Marti Conservation Services, Inc.
60128 Gooseberry Hollow Rd.
California, MO 65018
(573) 796-2190
rmcs@sprintmail.com

Patrick F. Rice

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14915 Pocono Circle
St. Louis, MO 63017-2438
(314) 532-5107
pfrice@primary.net

Ireneusz Szelag

Szelag Art Conservation, Inc.
2509 A Woodson Road
St. Louis, MO 63114-5436
(314) 427-3006
ireks@aol.com

Phoebe Dent Weil

Northern Light Studio
1602 Locust Street
Suite 815-A
St. Louis, MO 63103
(314) 588-9680
FAX (314) 588-9681
phoebe@northernlightstudio.com

ARCHITECTURAL CONSERVATION

6.2.24

For additional assistance in locating and selecting a conservator, please contact the American Institute for Conservation at (202) 452-9545 or visit their website at <http://aic.stanford.edu/>. You may also contact the Missouri Secretary of State's conservation lab at (573) 526-3866 for conservation information.

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2320 Hampton Avenue
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(314) 645-4949
FAX (314) 645-4990
wollenbergconservation@compuserve.com

